

Market Insights

RECREATIONAL VEHICLE
3RD Quarter 2020

RV Market Industry Overview

RV and travel trailer dealers were busy in the summer and early fall, as customers shifted from destination-oriented air travel to experience-oriented road travel.

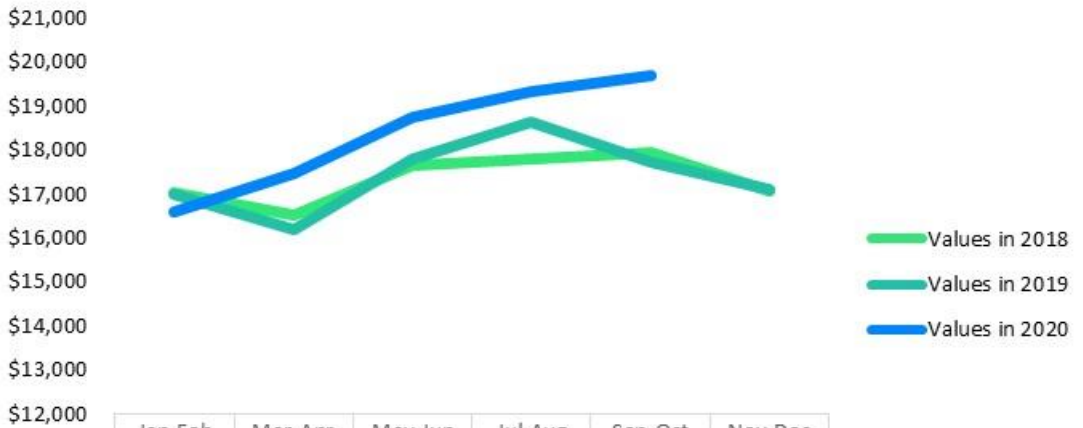
Every segment we track performed better in the most recent period year-over-year. Looking at travel trailers, standard hitch units saw no traditional seasonal dip, and are bringing 11.2% higher values year-over-year. Fifth-wheel units did pull back from their summer high but are still running 11.4% ahead of last year. Motorhomes continue to crush last year's results, with Class A vehicles valued 12.4% higher than the same period of 2019, and Class C units 10.0% higher. Smaller vehicles are also holding up well, with camping trailers running 7.9% ahead of last year and truck campers 7.2% ahead.

The RV industry continues to benefit from the shift to domestic travel. Hitting the highway will continue to be one of the only ways to see new scenery with the family until the pandemic is behind us.

Travel Trailer Values

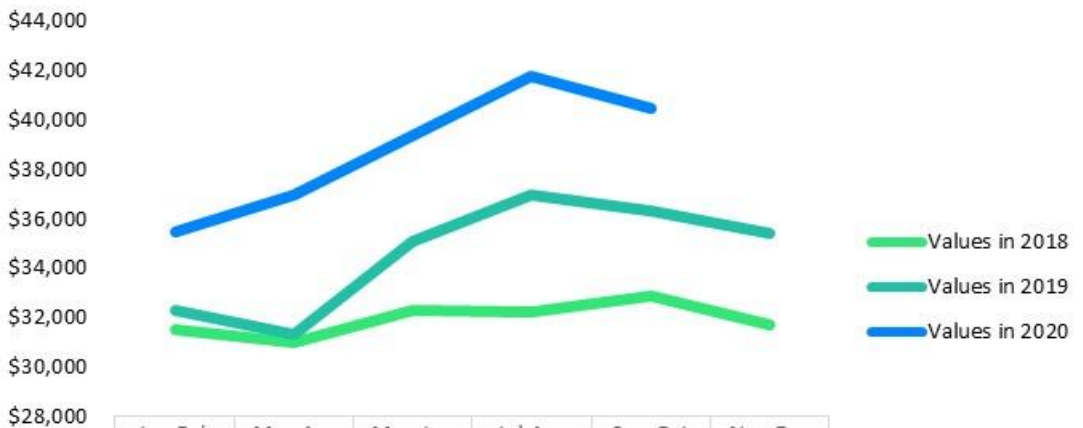
Average Retail Value by Category – Values for the Last 10 Model Years

Standard Hitch



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	\$17,022	\$16,537	\$17,640	\$17,807	\$17,939	\$17,070
Values in 2019	\$16,985	\$16,208	\$17,816	\$18,624	\$17,711	\$17,095
Values in 2020	\$16,613	\$17,477	\$18,742	\$19,346	\$19,686	

Fifth Wheel



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	\$31,501	\$30,980	\$32,313	\$32,254	\$32,881	\$31,678
Values in 2019	\$32,263	\$31,344	\$35,072	\$36,984	\$36,352	\$35,440
Values in 2020	\$35,503	\$36,969	\$39,368	\$41,795	\$40,496	

Motorhome Values

Average Retail Value by Category – Values for the Last 10 Model Years

Class A



Class C



Camping Trailer & Truck Camper Values

Average Retail Value by Category – Values for the Last 10 Model Years

Camping Trailer



Truck Camper



Travel Trailer Values vs. Traffic

Average Retail Value and Traffic View by Category

Standard Hitch



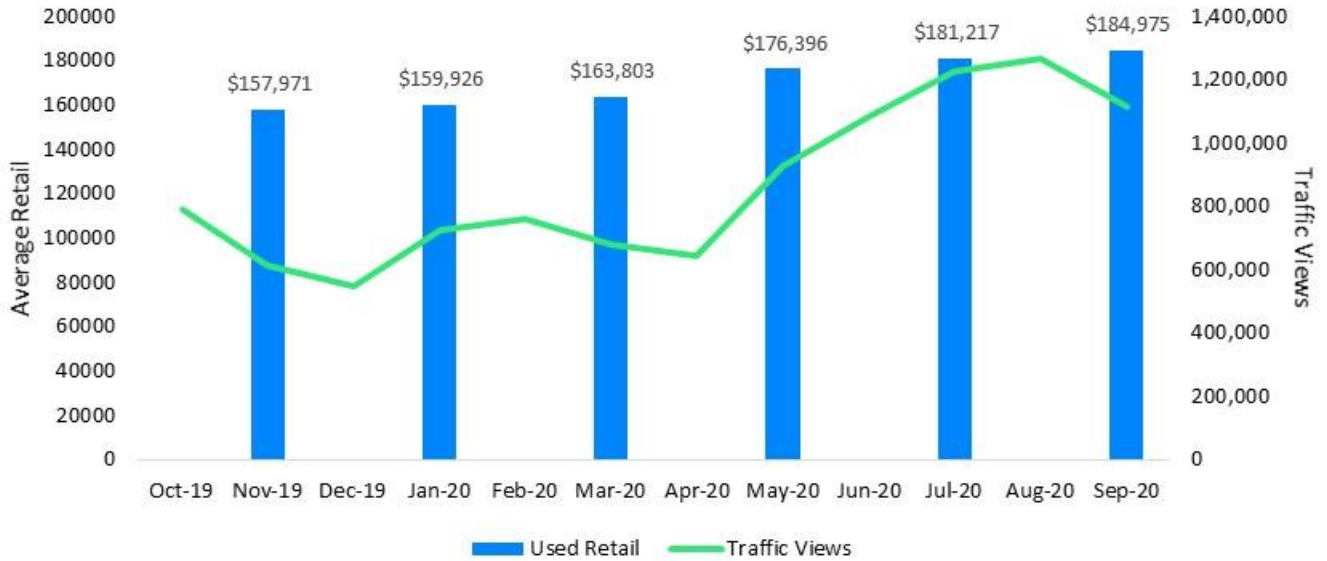
Fifth Wheel



Motorhome Values vs. Traffic

Average Retail Value and Traffic View by Category

Class A



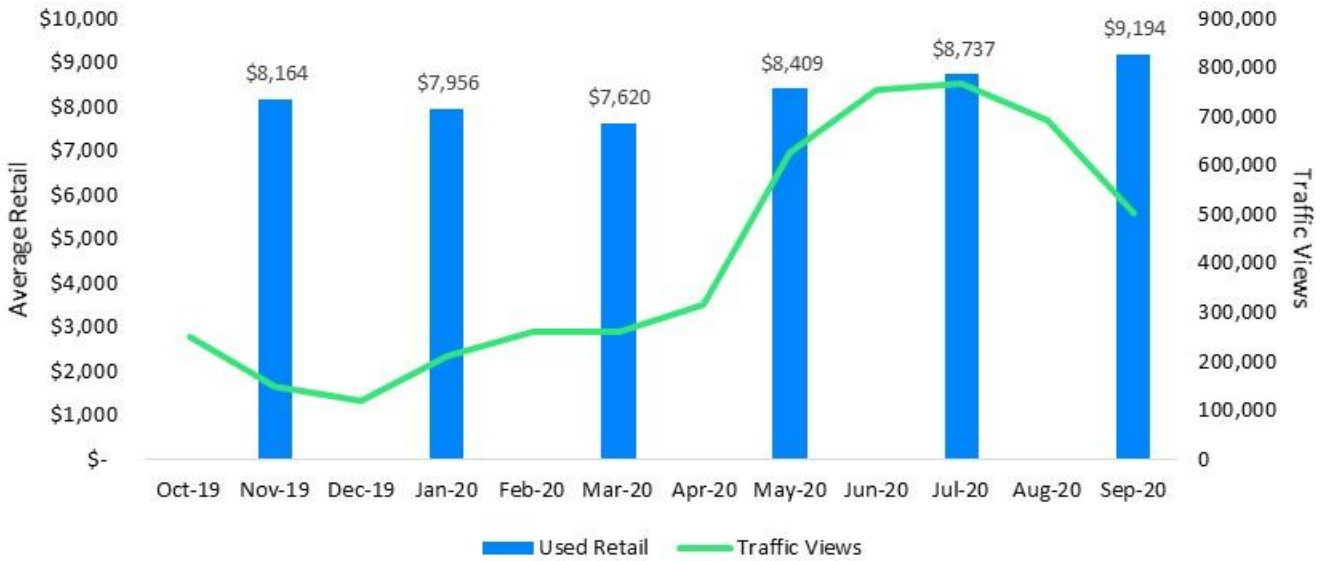
Class C



Camping Trailer & Truck Camper Values vs. Traffic

Average Retail Value and Traffic View by Category

Camping Trailer

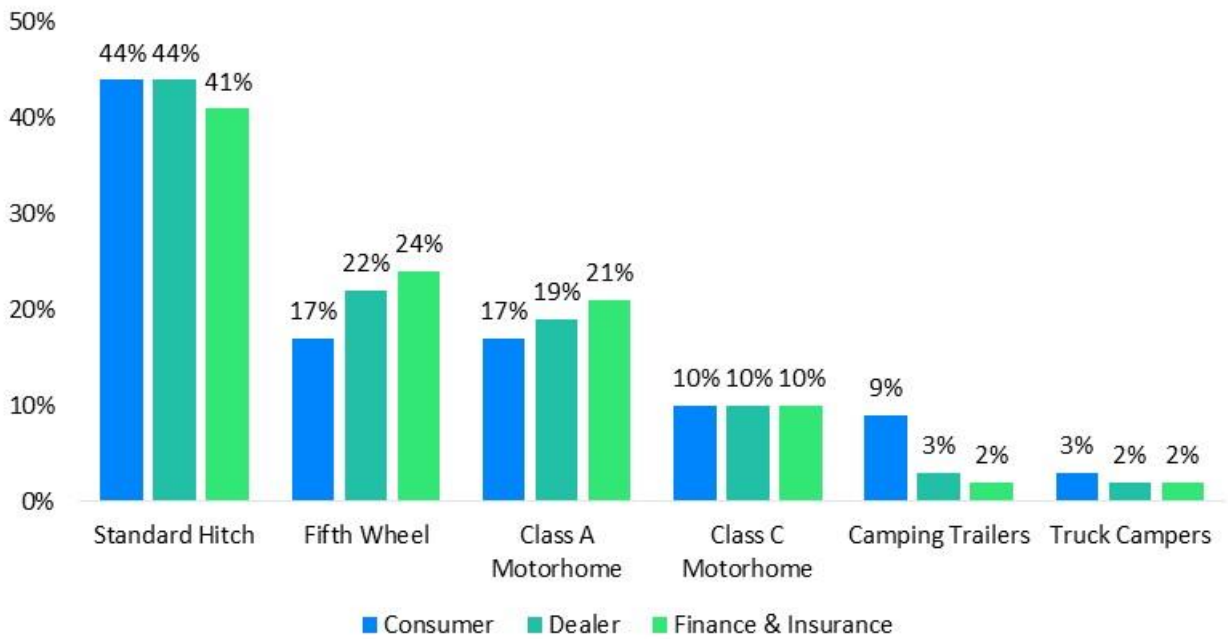


Truck Camper



RV Categories

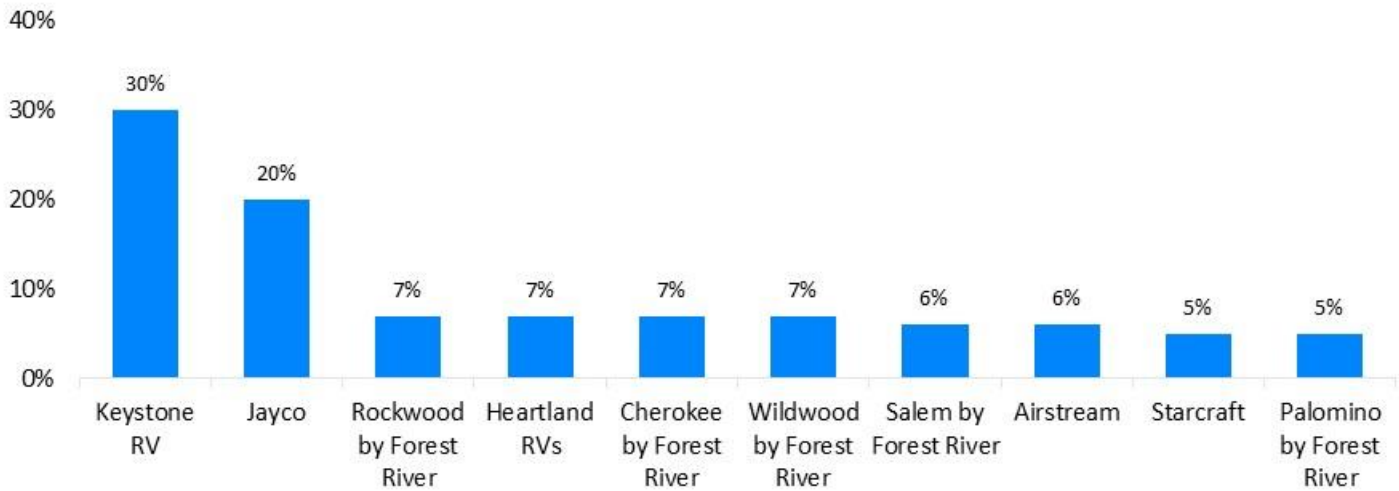
Views Among Consumers, Dealers, and Finance & Insurance Institutions in 2020 Q1-Q3



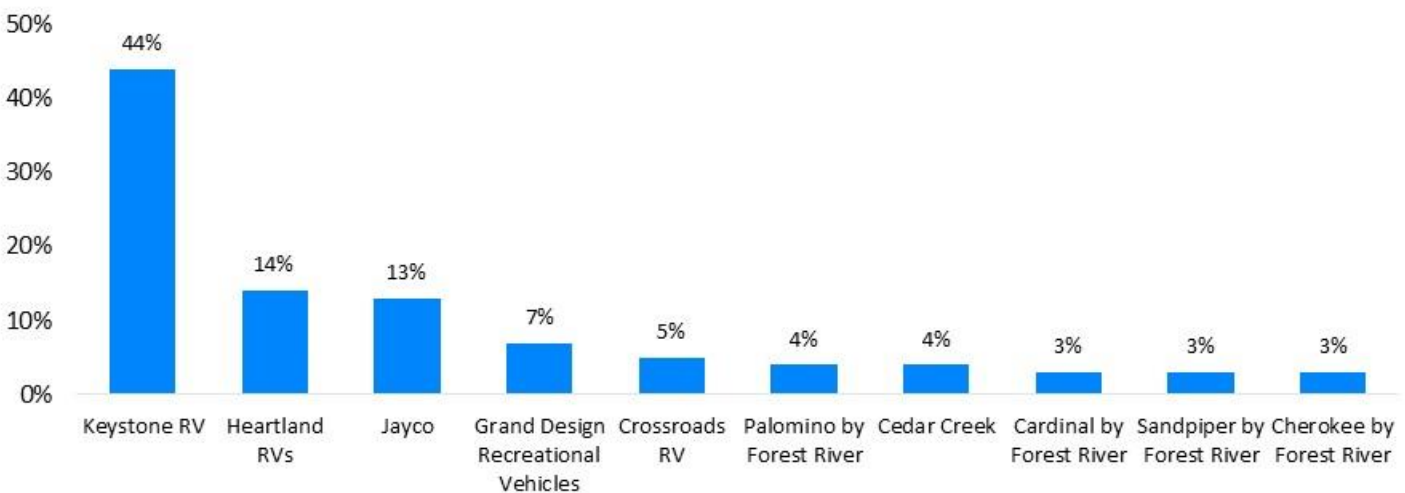
Travel Trailer Brands

Top Researched Brands in 2020 Q1-Q3

Standard Hitch Brands



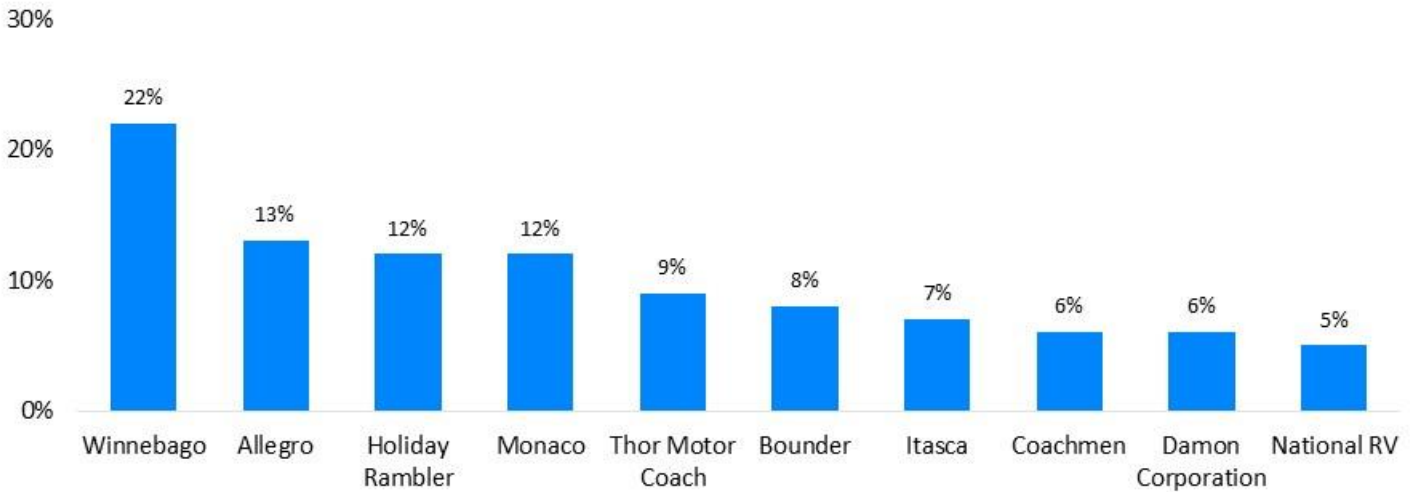
Fifth Wheel Brands



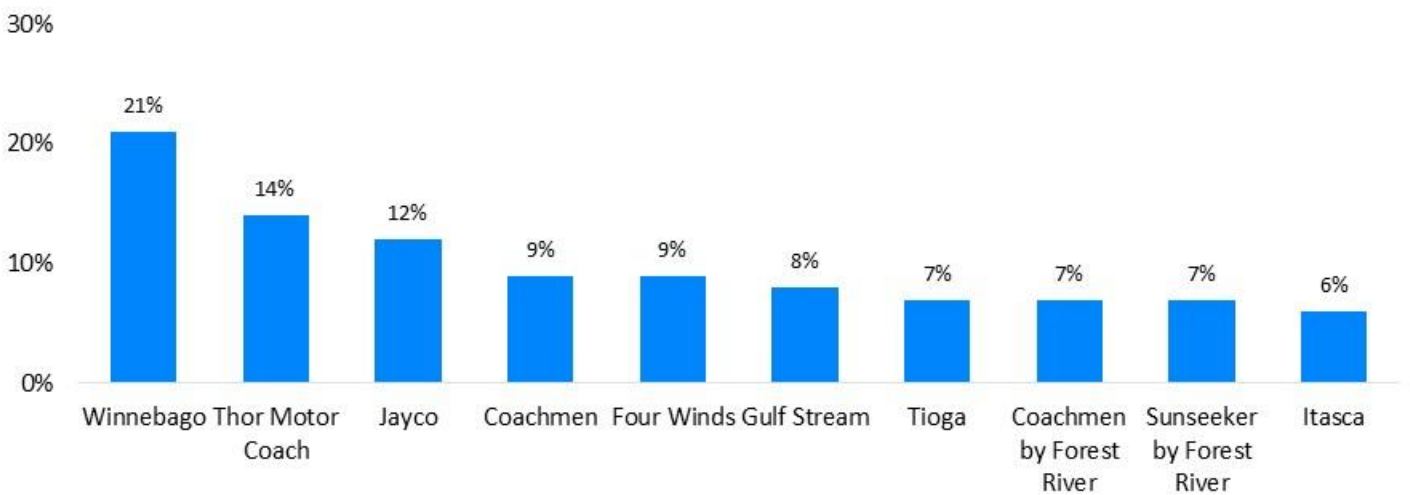
Motorhome Brands

Top Researched Brands in 2020 Q1-Q3

Class A Brands



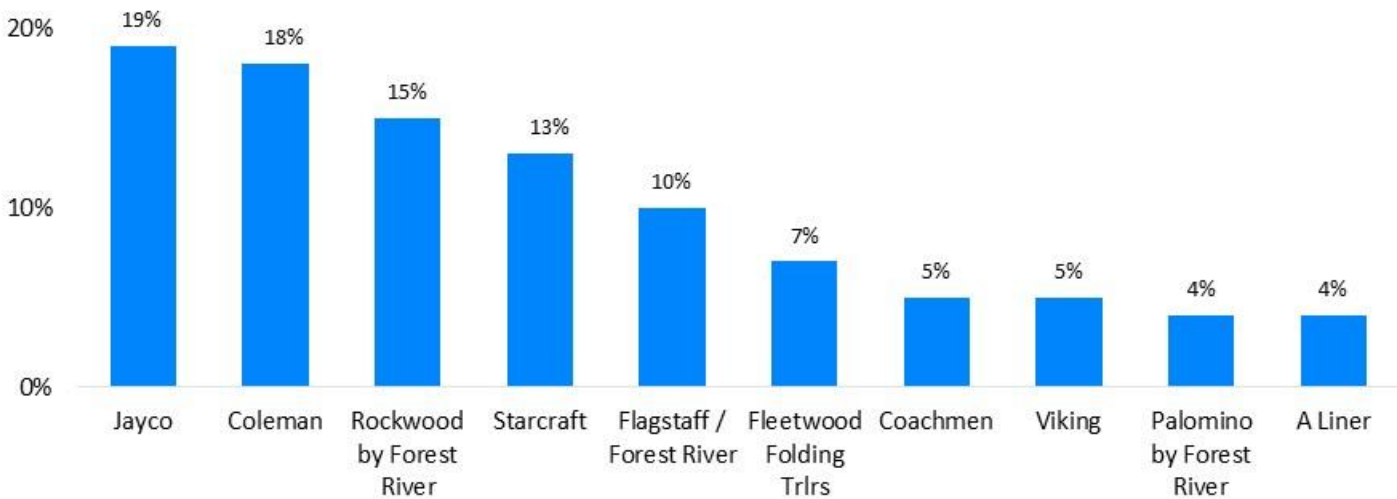
Class C Brands



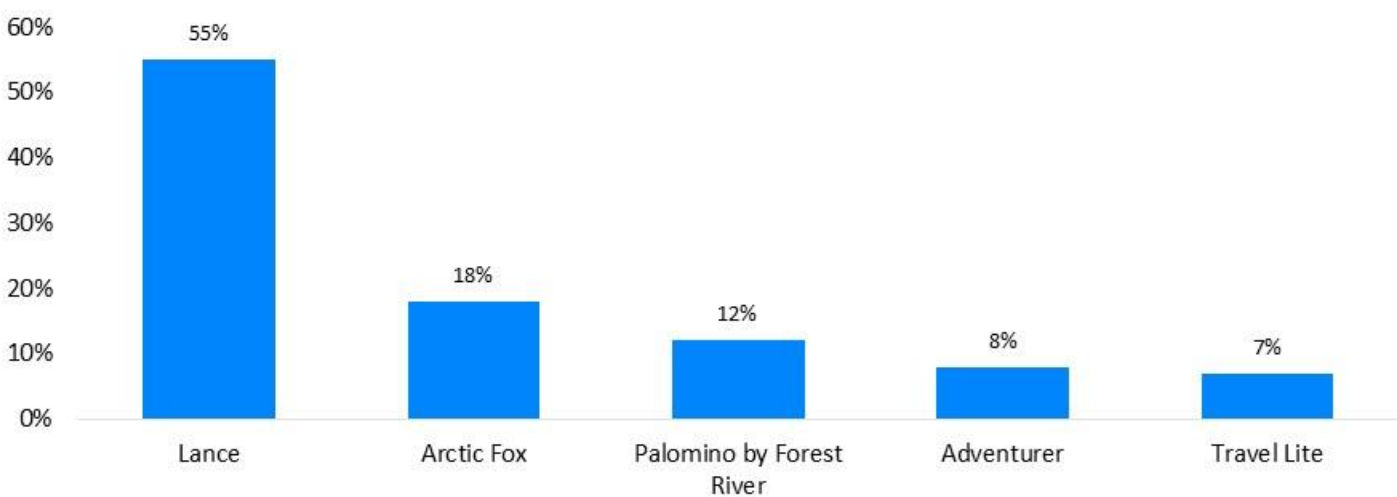
Camping Trailer & Truck Camper Brands

Top Researched Brands in 2020 Q1-Q3

Camping Trailer Brands



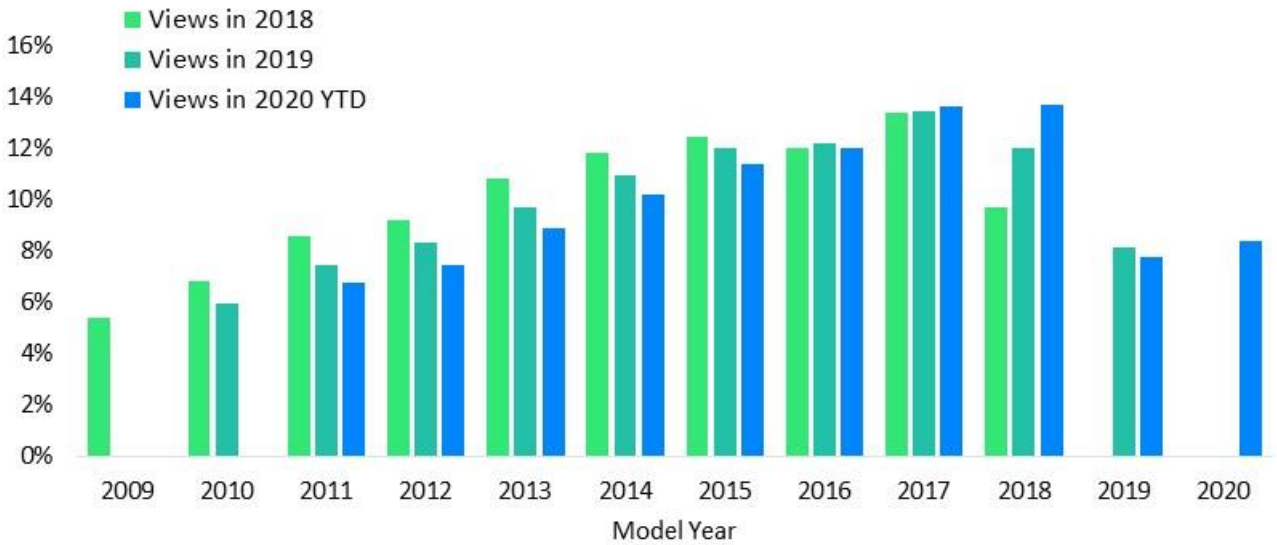
Truck Camper Brands



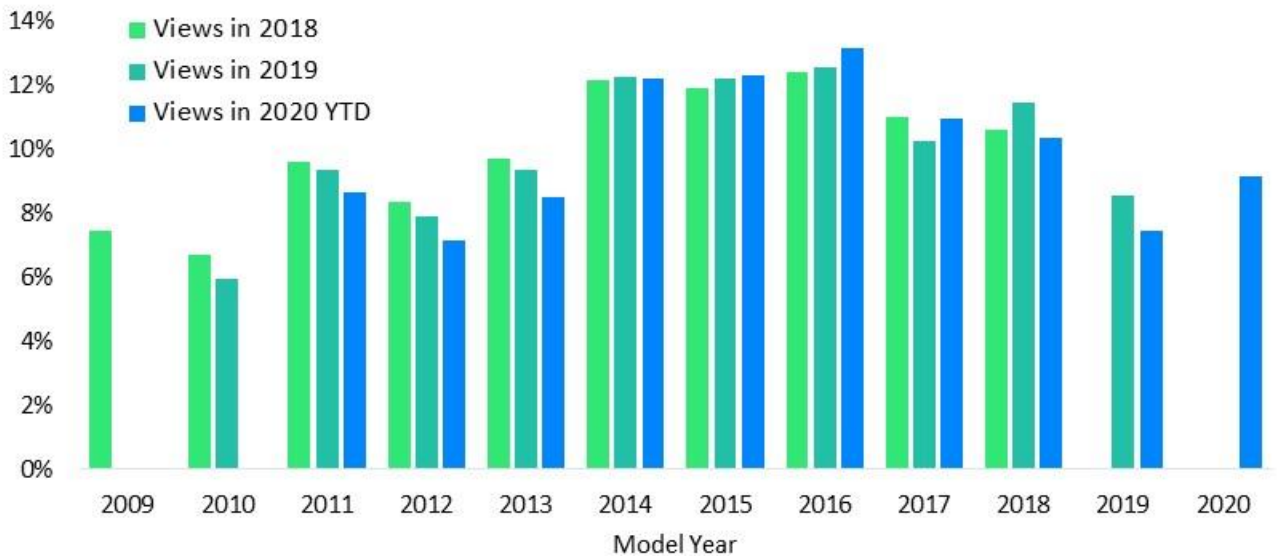
Model Years

Top Researched Model Years by Category

Standard Hitch Travel Trailer



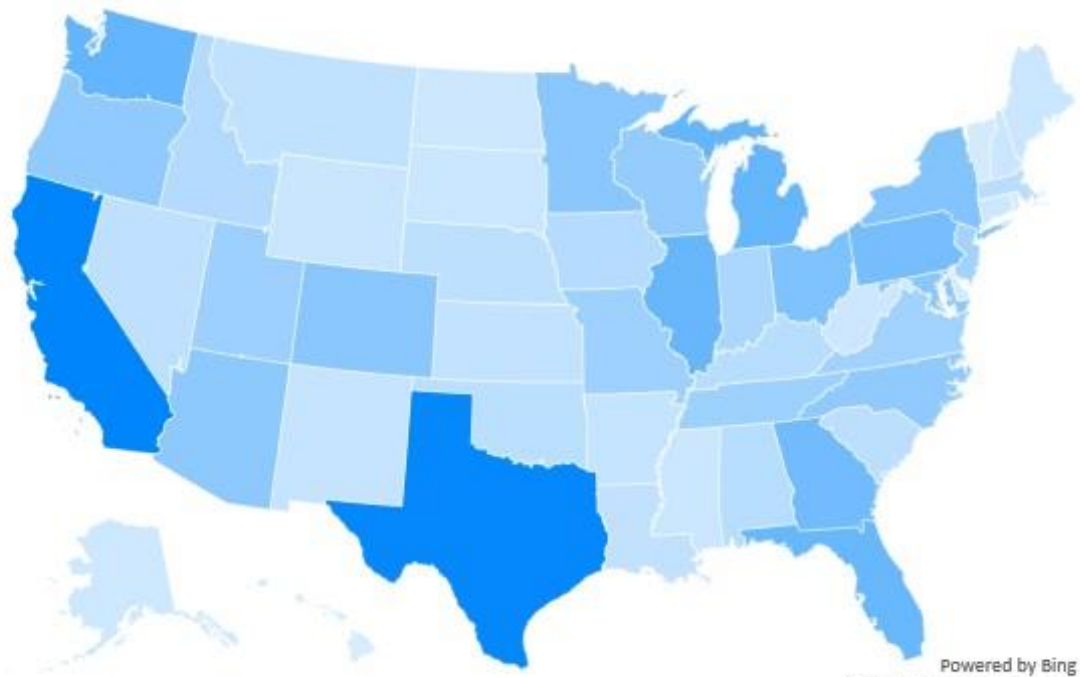
Class A Motorhome



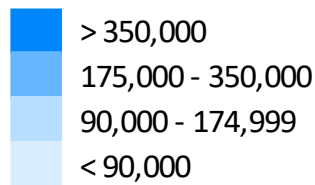
Web Traffic by State

Traffic by State in 2020 Q1-Q3

Travel Trailers



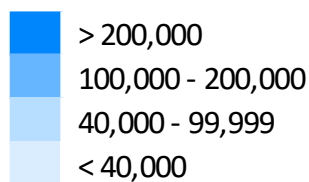
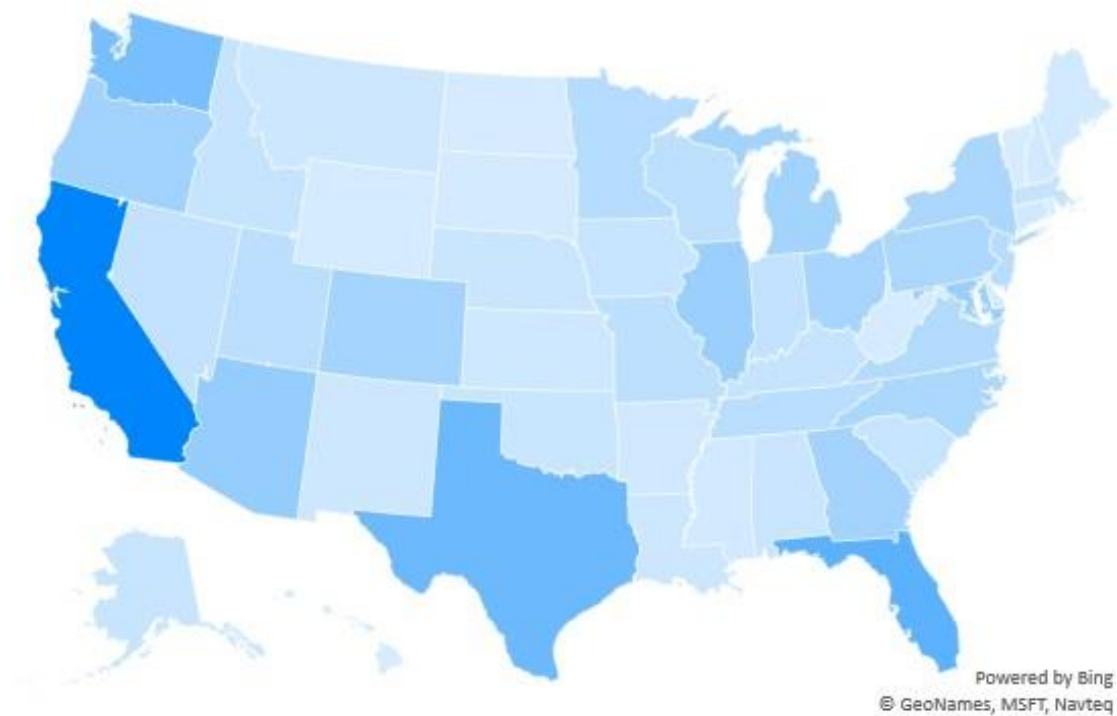
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Web Traffic by State

Traffic by State in 2020 Q1-Q3

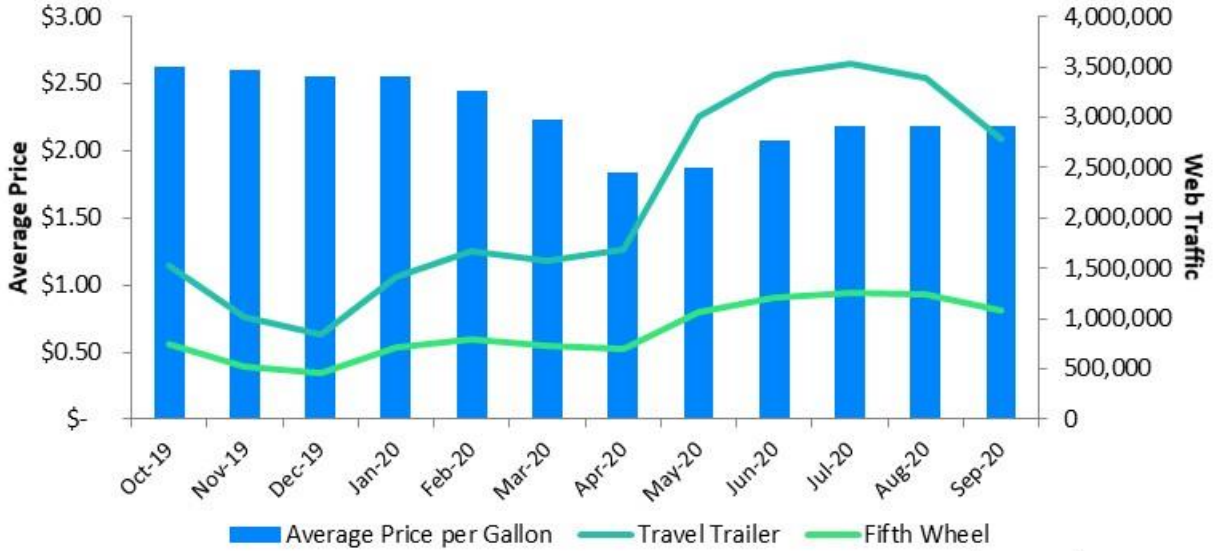
Class C Motorhomes



Fuel Price Data

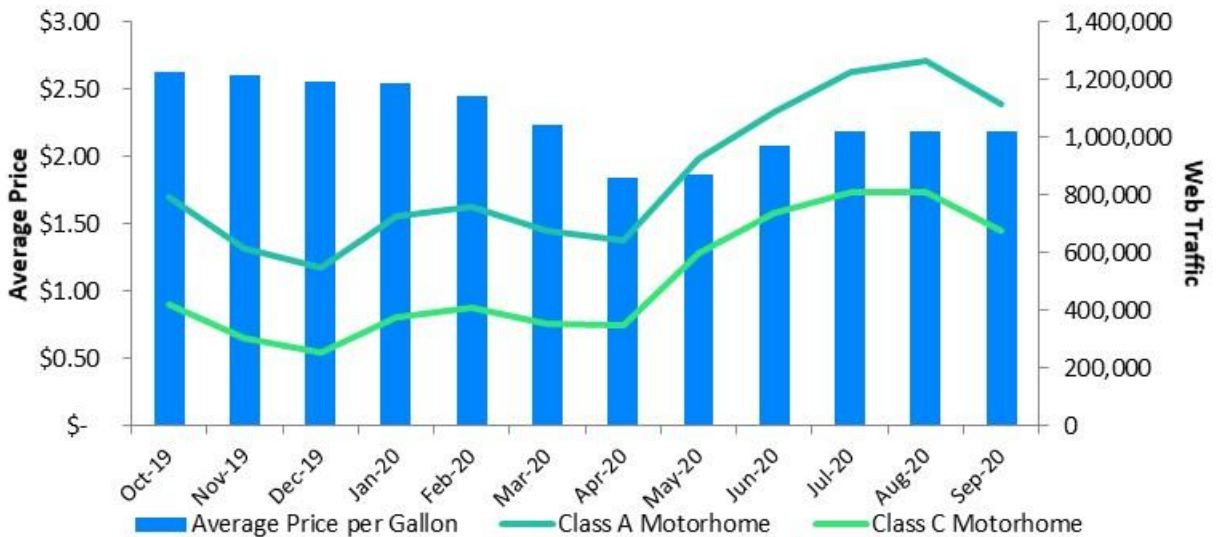
Regular Grade Gasoline Prices vs. Consumer Traffic by Category

Travel Trailer / Fifth Wheel



Source: U.S. Energy Information Administration

Motorhomes



Source: U.S. Energy Information Administration

Economic Data

Unemployment & Labor Participation Rate (Seasonally Adjusted)



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